Career Conditional Appointment

Introduction

When an employee is hired into a Career Conditional Appointment, the **Hire** page group in the **Administer Workforce** module must be completed.

This page group consists of seven pages, and will allow the users to collect necessary demographic information on the new employee as well as the position they will encumber. The user will process the Career Conditional appointment using the following NOA code, 101-0.

NOTE: Fields that are not required are not listed within the procedure. Optional fields that an end-user may choose to complete are not detailed.

Navigational Path

Home ➔ Administer Workforce ➔ Administer Workforce (USF) Use ➔ Hire

Navigational Tips

- The icon represents a look-up prompt. Clicking this button will allow you to look up all possible entry options for this field.
- The icon represents a date prompt. Clicking this button will produce a pop-up calendar for reference. To select a specific date from the pop-up calendar as the field entry, simply click on the date. Use the arrows to move through the months and years.

Position Number

Before beginning to process a Career Conditional Appointment, be sure to make note of the position number to which the employee will be assigned. Verify that the position number is correct BEFORE doing the Hire action. Many data fields will be populated in the employee record based on the position number selected, so it is imperative that the correct one is used.

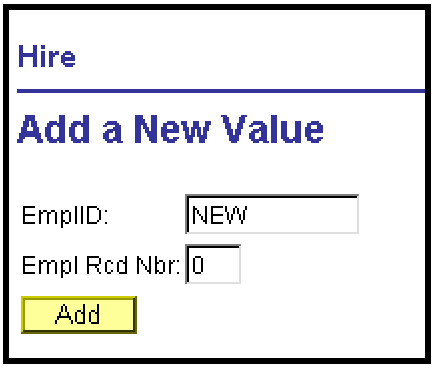
Procedure

The following steps detail the procedure for processing a career conditional appointment:

1 Follow the navigational path:

Home ➔ Administer Workforce ➔ Administer Workforce (USF) ➔ Use ➔ Hire

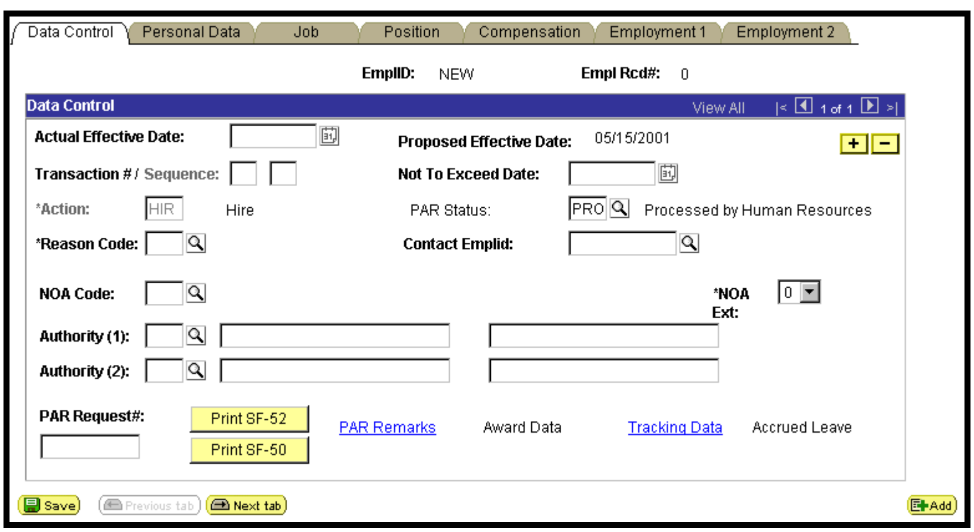
The following **Hire** sub-page appears:



*NOTE: Do not change the **Empl Rcd Nbr.** It must remain "0."*

2 Click Add.

The following **Data Control** page appears:



NOTE: The EmplID will default in as "New" until Save is clicked. EHRP will then autogenerate a sequential EmplID for the employee. Do not save until all required fields are completed.

3 In the **Actual Effective Date** field, type the date the appointment is to become effective in the system.

NOTE: The Proposed Effective Date field is populated by default with the date entered in the Actual Effective Date field. Since human resources personnel processing a request have final authority on when the action becomes effective, and they will enter the official actual effective date, but the proposed effective date will remain unchanged.

*NOTE: The **Transaction #**, will populate with a value of "**1**."*

NOTE: If multiple actions have the same effective date, click + to add a row. When entering a second row with the same Effective Date, the "Transaction #" will increase to 2.

4 Enter "NPS" (New Position) in the **Reason Code** field.

5 Enter **NOA** (Nature of Action) **Code** "101" (Career Conditional Appointment).

6 Enter the **NOA Ext** (Extension).

*NOTE: The **NOA Ext** has been carried over from the IMPACT 4-digit NOA codes. If, for example, the NOA Code in IMPACT was "1010," the NOA Code in EHRP is "101" with a NOA Ext of "0."*

7 Enter the applicable authority in the **Authority (1)** field.

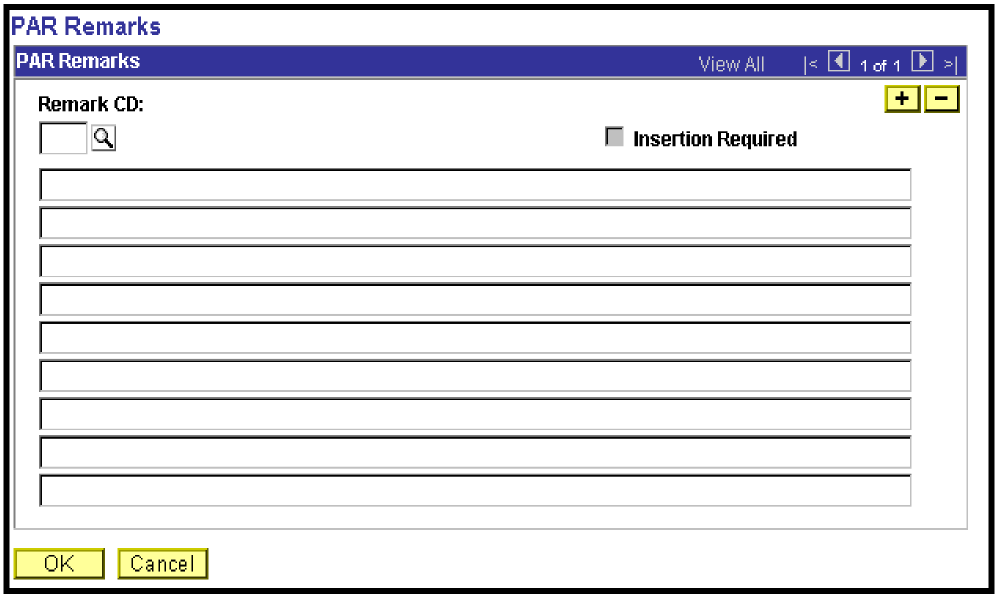
8 Enter **Authority (2)**, if applicable.

9 In the **PAR Request #** field, enter the applicable PAR Request number.

NOTE: This field is not required but can be used for PAR request tracking purposes.

10 To enter **PAR Remarks**, click the hyperlink of the same name.

The following **PAR Remarks** sub-page appears:



11 Enter the applicable **Remark CD (Code)** and tab out of the field to see the text of the remark.

NOTE: To add additional remarks, use the + to insert a row.

NOTE: If the ***Remark CD*** *contains a "****", you must replace the asterisks with specific information. (i.e. this field may prompt you to enter date)*

NOTE: To enter a freeform remark, enter "ZZZ" in the ***Remark CD*** *field. Enter applicable remark text in sentence format. Text should fill the line. Once the line is filled, move to the next line. There is no autowrap feature. Do not hyphenate across lines. If a word requires hyphenation, move it to the next line. Do not use bullets or dashes. The "ZZZ" remark can only be used once for each personnel action.*

NOTE: Within the EHRP system, there is no limit to the number of remarks that can be captured.

Mandatory Remarks

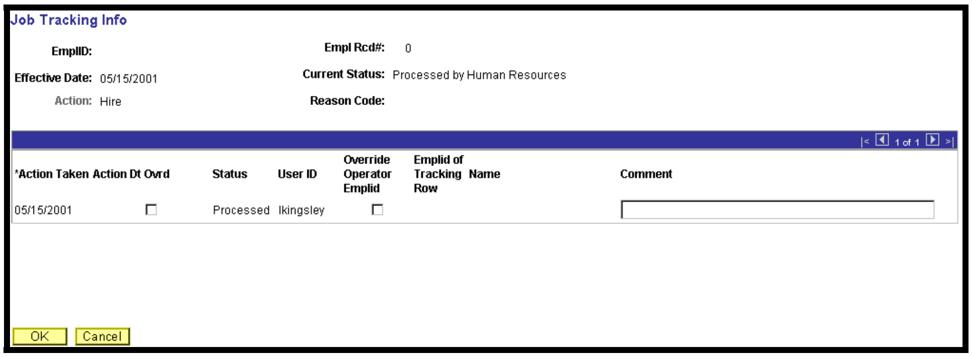
The system does not generate or suggest mandatory remarks that need to be entered in accordance with the NOA Code you are processing. Use the appropriate remarks based on OPM processing guidelines. There will no longer be HHS specific remarks for entry, except for the freeform ZZZ.

Procedure (cont'd)

12 When entry of the PAR Remarks is complete, click OK to return to the **Data Control** page.

13 Click the **Tracking Data** hyperlink.

The following **Job Tracking Info** sub-page appears:



Job Tracking Info

EmplID:

Empl Rcd#: 0

Effective Date: 05/15/2001

Current Status: Processed by Human Resources

Action: Hire

Reason Code:

1 of 1

*Action Taken	Action Dt Ovrd	Status	User ID	Override Operator Emplid	Emplid of Tracking Row	Name	Comment
05/15/2001	☐	Processed	lkingsley	☐			

OK Cancel

14 Enter any necessary **Comment,** or review comments made by previous role users in the workflow.

NOTE: There is a 30 character limit in the ***Comment*** *field.*

Job Tracking Info

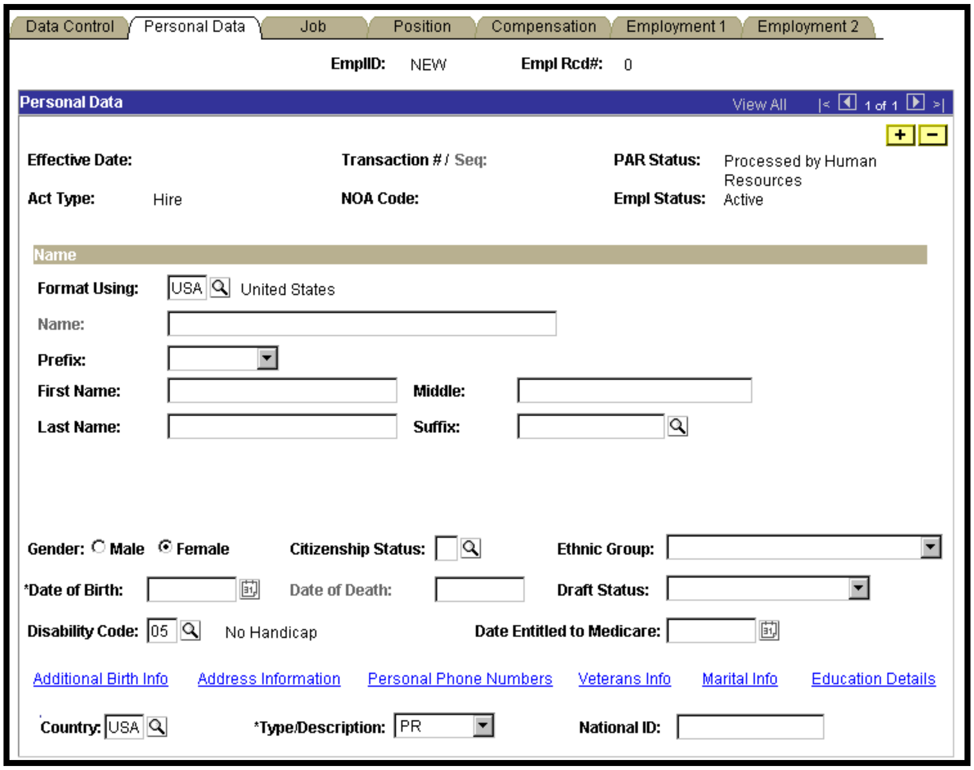
The **Job Tracking Info** page is to be used only for entering and reviewing comments. Only the **Comment** field should be used. Notes made by colleagues in relation to this particular action may be read and entered on this page.

Procedure (cont'd)

15 Click OK to return to the **Data Control** page.

16 Click on the **Personal Data** tab.

The following **Personal Data** page appears:



17 From the dropdown menu, select the **Prefix** for the person being entered.

18 Enter the **First Name**.

19 In the **Middle** field enter the employee's middle name or middle initial, as applicable.

20 Enter the **Last Name**.
NOTE: While EHRP accepts last names with an apostrophe, the legacy system does not. For last names with an apostrophe, leave a space in lieu of the apostrophe. For hyphenated last names, leave a space in lieu of the hyphen.

21 Enter the **Suffix**, if applicable.

NOTE: The Name field (grayed out) will populate with the employee's full name.
NOTE: If the suffix you want to use is not available, add the suffix to the end of the last name field.

22 Select the appropriate radio button for **Gender**.

23 Enter the **Citizenship Status**.

NOTE: The default is "1" for US citizen. Other valid statuses are limited to the following:

Description
U.S. Citizen
Naturalized
Alien Permanent
Alien Temporary
Permanent Resident
Employment Visa
Canadian Citizen
Other
Not Indicated

24 Use the dropdown menu to select **Ethnic Group**.
NOTE: Upon save, this field will diasappear from view.

25 Enter the **Date of Birth**.

26 Enter the **Disability Code**, if applicable.

NOTE: This field will default with "05," i.e., "No Handicap."
NOTE: Upon save, this field will disappear from view.

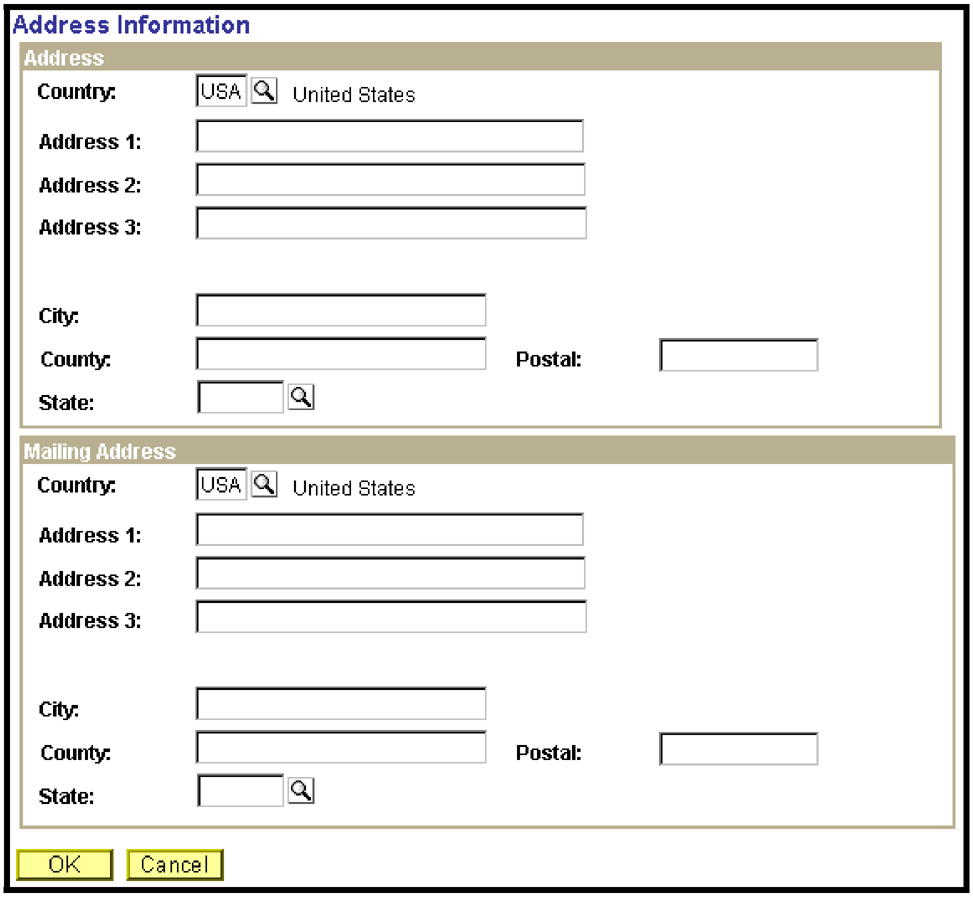
Multiple Disabilities

Only one disability will be recorded. If the employee has multiple disabilities, enter the disability that is most limiting to the employee.

Procedure (cont'd)

27 Click the **Address Information** hyperlink.

The following **Address Information** sub-page appears:



28 Confirm the default country of **USA** or enter another country.

29 Enter the address in the **Address 1** field.

*NOTE: There is a 25 characters restriction in the **Address 1** field.*

30 Enter the **City**.

31 Enter the **Postal** (ZIP) code.

32 Enter the **State.**

*NOTE: To enter the **Mailing Address**, follow the same steps as the primary address. There is a 25 characters restriction in this address field as well.*

*NOTE: After the Hire action is completed and saved, you must immediately create another action to capture the address for Payroll. Add another row with the same effective date as the Hire, and use **999-5 NOA**. This new row will copy the address you created in the Hire action, and transmit the address to Payroll.*

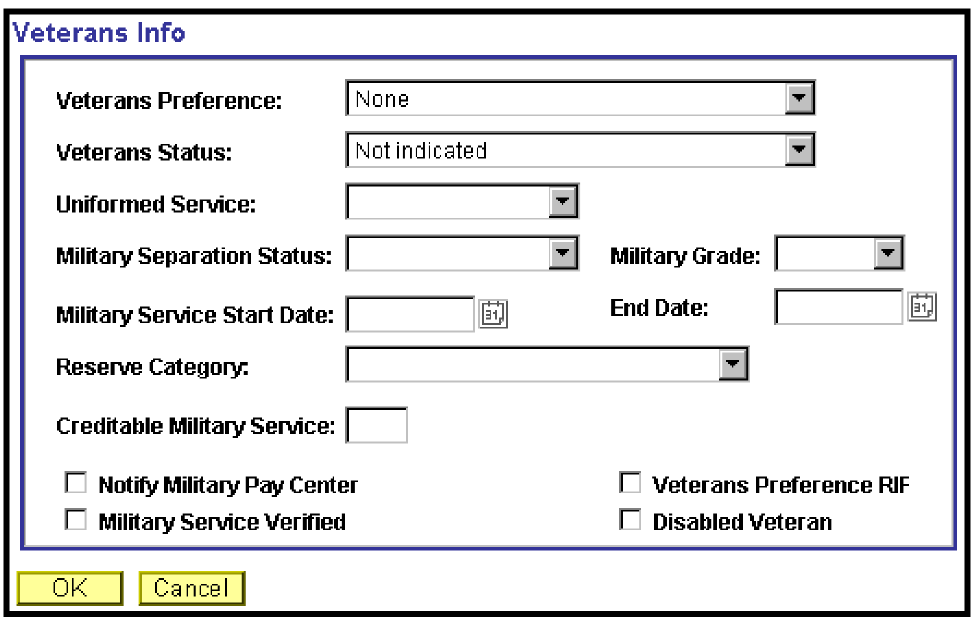
*NOTE: If the employee uses a different mailing address from his or her primary address, complete the **Mailing Address** area. The **Mailing Address** field is for information purposes only so it will not go to payroll. It could be used to record an employee's foreign address.*

33 Click OK to return to the **Personal Data** page.

34 Click the **Veterans Info** hyperlink.

*NOTE: If there is no Veterans information, you may skip to step 46. The **Veterans Info** defaults to None.*

The following **Veterans Info** sub-page appears:



35 If applicable, change the **Veterans Preference** from the "None" default using the dropdown menu.

36 Select the **Veterans Status** from the dropdown menu.

37 Select the **Uniformed Service or Public Health Service** from the dropdown menu.

38 Select the **Military Separation Status** from the dropdown menu.

39 Select the **Military Grade** from the dropdown menu.

40 Enter the **Military Service Start Date**.

41 Enter the Military Service **End Date**.

42 Select the **Reserve Category** from the dropdown menu.

43 Enter the **Creditable Military Service** (months/year).

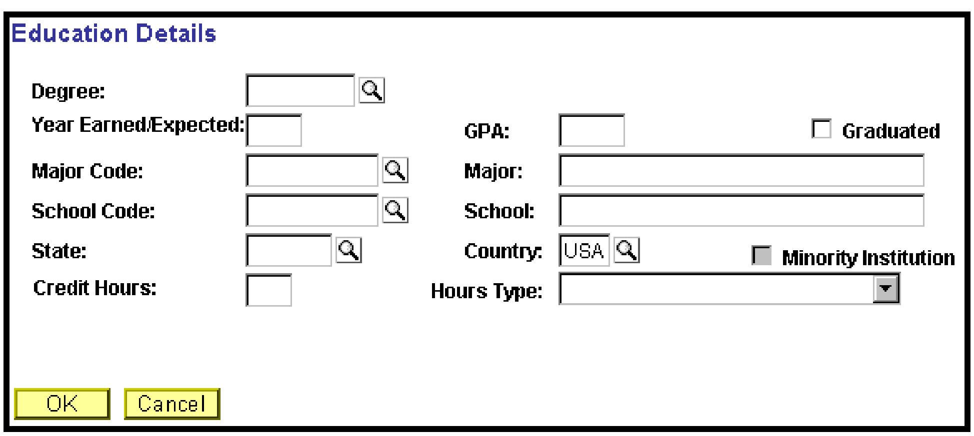
44 Confirm the status of the **Veterans Preference RIF** checkbox.

45 Click OK to return to the **Personal Data** page.

46 Click the **Education Details** hyperlink.

*NOTE: The **Education Details** panel will appear upon saving the hire action if the education details have not been entered. Education Details must be entered in order to save the action..*

The following **Education Details** sub-page appears:



47 Enter the employee's **Degree.**

48 Enter **Year Earned/Expected**.

49 Enter the employee's **GPA** if applicable.

50 Confirm the status of the **Graduated** checkbox, if known.

51 Enter the **Major Code.**

Note: The Major Codes are the OPM values.

Note: To view or modify the Education information once the employee has been hired, the user would need to go to ***Home>Develop Workforce>Manage Competencies>Use>Education*** *and update the necessary information.*

Note: The Education details hyperlink is not enabled when entering the hire in INI. The Processor must be sure to enter the education details prior to changing the PAR status to PRO and saving the action.

52 Click OK to return to the **Personal Data** page.

53 Confirm the default of "USA" or modify the **Country** field, if applicable.

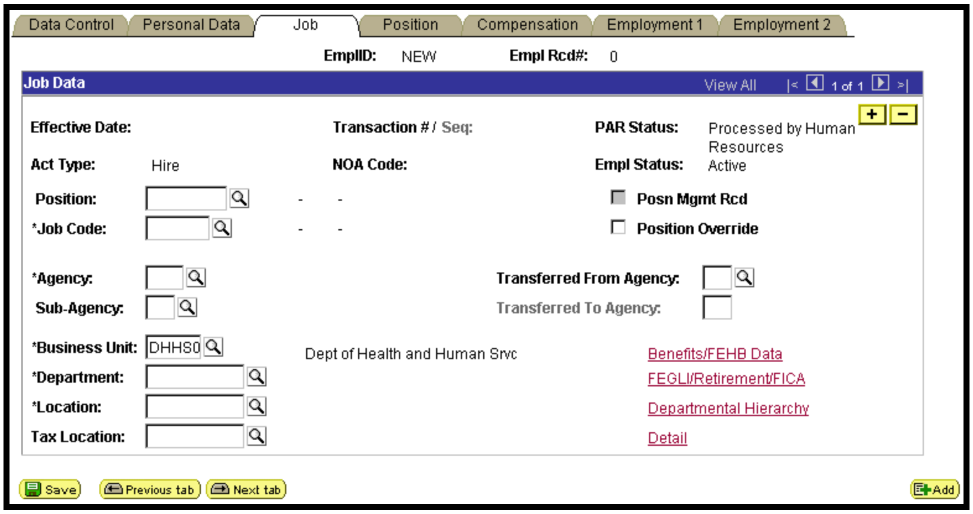
54 Confirm the default of "PR" or modify the **Type/Description** field.

NOTE:The Type/Description field indicates the type of National ID. "PR" is used for SSN.

55 Enter the **National ID**, which is the employee's Social Security Number (SSN).

56 Click on the **Job** tab to move to the next page.

The following **Job** page appears:



57 Enter the **Position** number.

NOTE: The following fields on this page will populate based upon the ***Position*** *that has been entered:*

- ***Job Code*** *(formerly the "PD#")*
- ***Agency***
- ***Sub-Agency***
- ***Business Unit***
- ***Department*** *(formerly the "Admin Code")*
- ***Location*** *(formerly the "GeoLoc Code")*
- ***Tax Location***

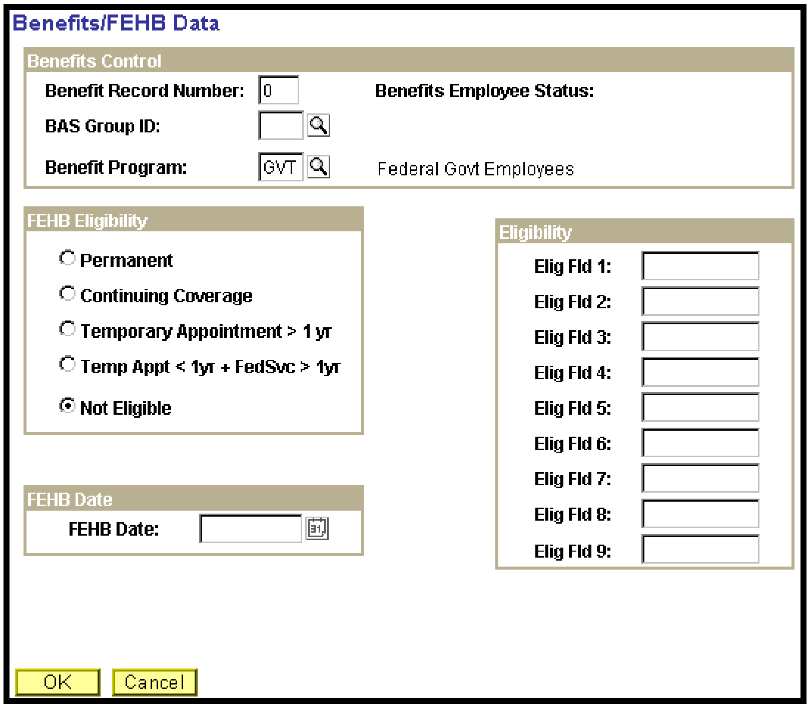
Position Override

The **Position Override** checkbox will allow the user to modify the position management data for this employee. This function is to be used on a limited basis for extreme EXCEPTIONS. If the box is checked, the employee's data must be maintained manually, and automatic action functionality will be disabled for this employee record.

Procedure (cont'd)

58 Click the **Benefits/FEHB Data** hyperlink.

The following sub-page appears:



59 Select the appropriate radio button to indicate **FEHB Eligibility**.

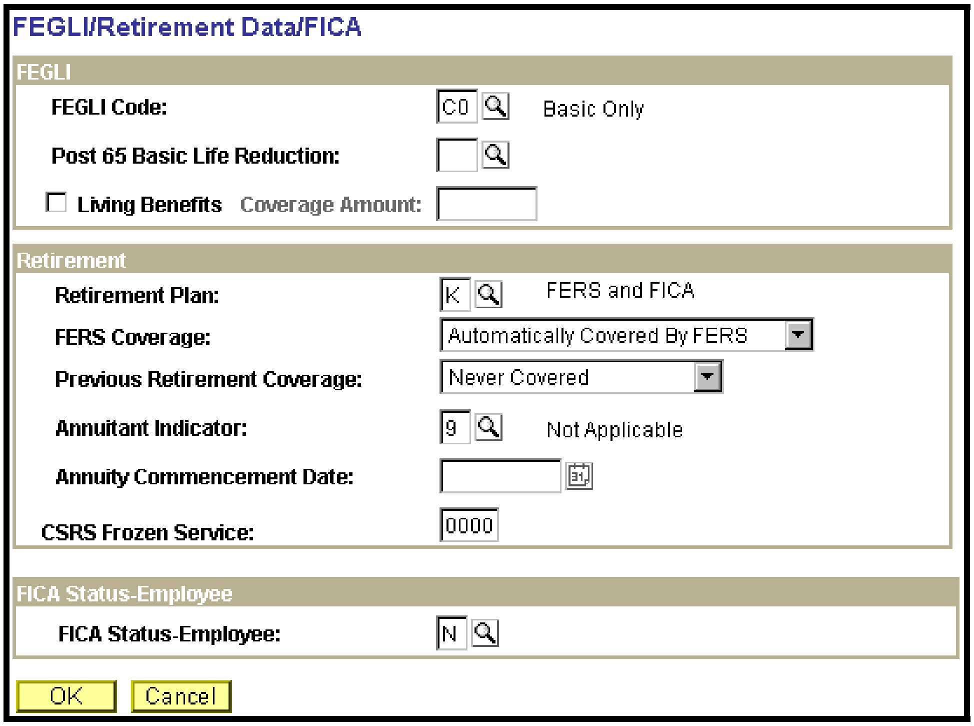
NOTE: The value in the Benefit Record Number field will default to "0". This is correct for nearly evey hire action you do, with one exception: For ***Consultants,*** *enter the value of "1".*

60 Click 

to return to the **Job** page.

61 Click the **FEGLI/Retirement/FICA** hyperlink.

The following sub-page appears:



62 Confirm the default of "**C0**" ("Basic Only") or modify the **FEGLI Code.**

63 Confirm the default of "**K**" ("FERS and FICA") or modify the **Retirement Plan**.

64 Select the **FERS Coverage** from the dropdown menu, if applicable.

65 Select the **Previous Retirement Coverage** from the dropdown menu, if applicable.

66 Confirm the default of "**9**" (Not Applicable) or modify the **Annuitant Indicator**.

67 Enter the **Annuity Commencement Date**, if applicable.

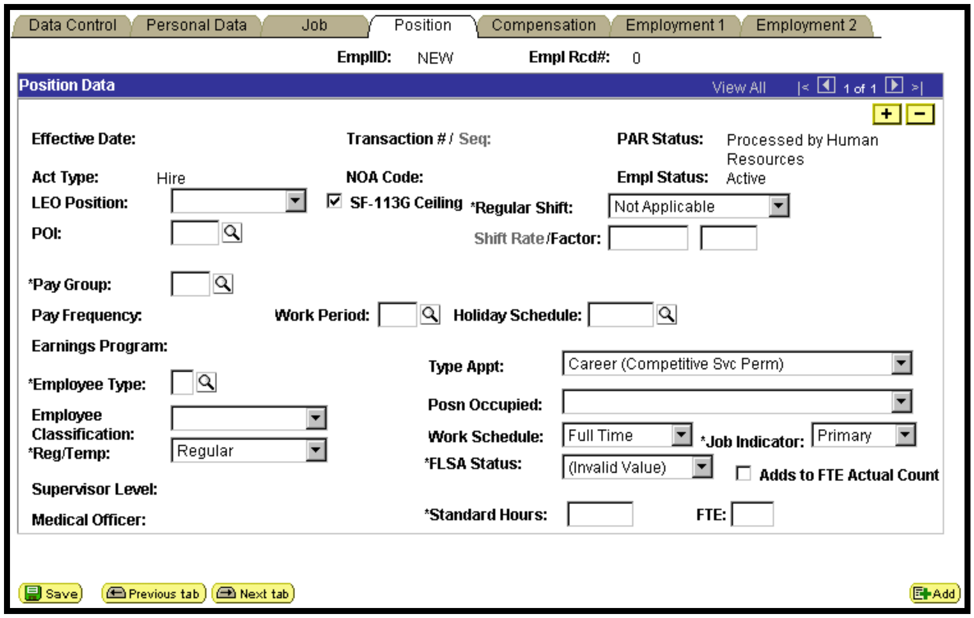
68 For **CSRS Frozen Service**, enter the appropriate service time, if applicable.

NOTE: In CSRS Frozen Service, this time span can be entered as a four-number code. The first and second positions indicate the number of years, while the third and fourth positions indicate the number of months. For example, a time span of 5 years and 3 months would be entered in CSRS Frozen Service as 0503.

69 Click OK to return to the **Job** page.

70 Click the **Position** tab.

The following **Position** page appears:



NOTE: The following fields will populate based on the position selected:

- ***LEO Position***
- ***Regular Shift***
- ***POI***
- ***Pay Group***
- ***Holiday Schedule***
- ***Work Period***
- ***Reg/Temp***
- ***Posn Occupied***
- ***Work Schedule***
- ***FLSA Status***
- ***Supervisor Level***
- ***Medical Officer***
- ***Standard Hours*** *(Also known as Base Hours. Be sure this value is <u>per week</u>.)*

71 Enter the **Pay Group** - GSB.

72 Click the **SF-113G Ceiling** checkbox, if applicable.

73 Select the **Employee Classification** from the dropdown menu, if applicable.

NOTE: This field is only used for Indian Preference.

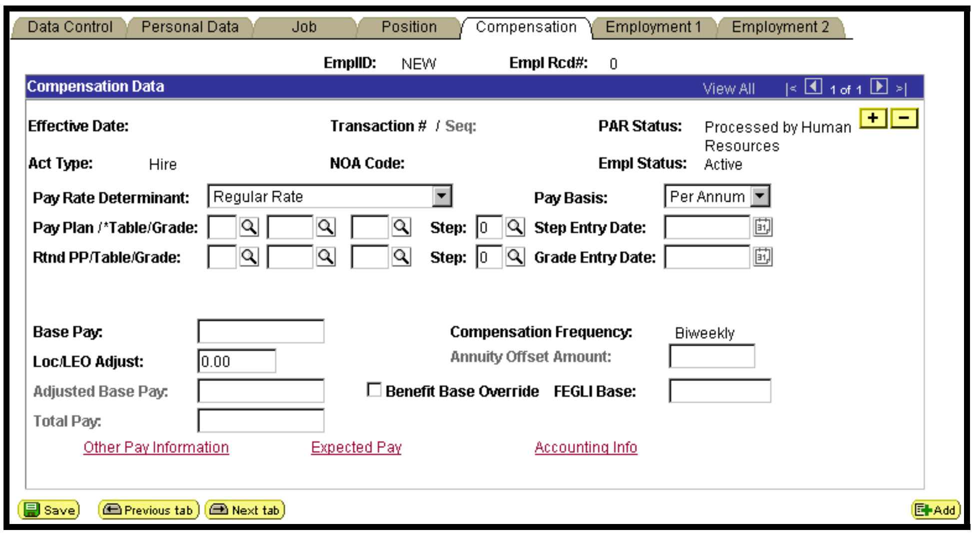
74 Select the **Type Appt** from the dropdown menu.

75 Select the **Job Indicator** from the dropdown menu.

NOTE: The default is "Primary."

76 Click on the **Compensation** tab.

The following **Compensation** page appears:



NOTE: The following fields default based upon the position selected:

- ***Pay Basis***
- ***Pay Plan***
- ***Table***
- ***Grade***

77 Select the **Pay Rate Determinant** from the dropdown menu.

*NOTE: If the employee is on a Retained Pay Grade, Pay Plan or Special Rate, you should select the appropriate option on the drop down and modify the **Rtnd PP/Table/Grade** fields accordingly.*

78 Enter the **Step.**

NOTE: For those employees who do not have a step, enter a "0" in the Step field.

NOTE: The page can not be saved until the Step is entered. After the Step is entered, the following fields will populate:

- ***Step Entry Date***
- ***Base Pay***
- ***Loc/LEO Adjust***
- ***Total Pay***
- ***FEGLI Base***

79 If the employee is an annuitant, enter the **Annuity Offset Amount.** This amount should be entered based on the employee's compensation frequency. If the employee's compensation frequency is annual, the annuity offset amount should be an annual amount.

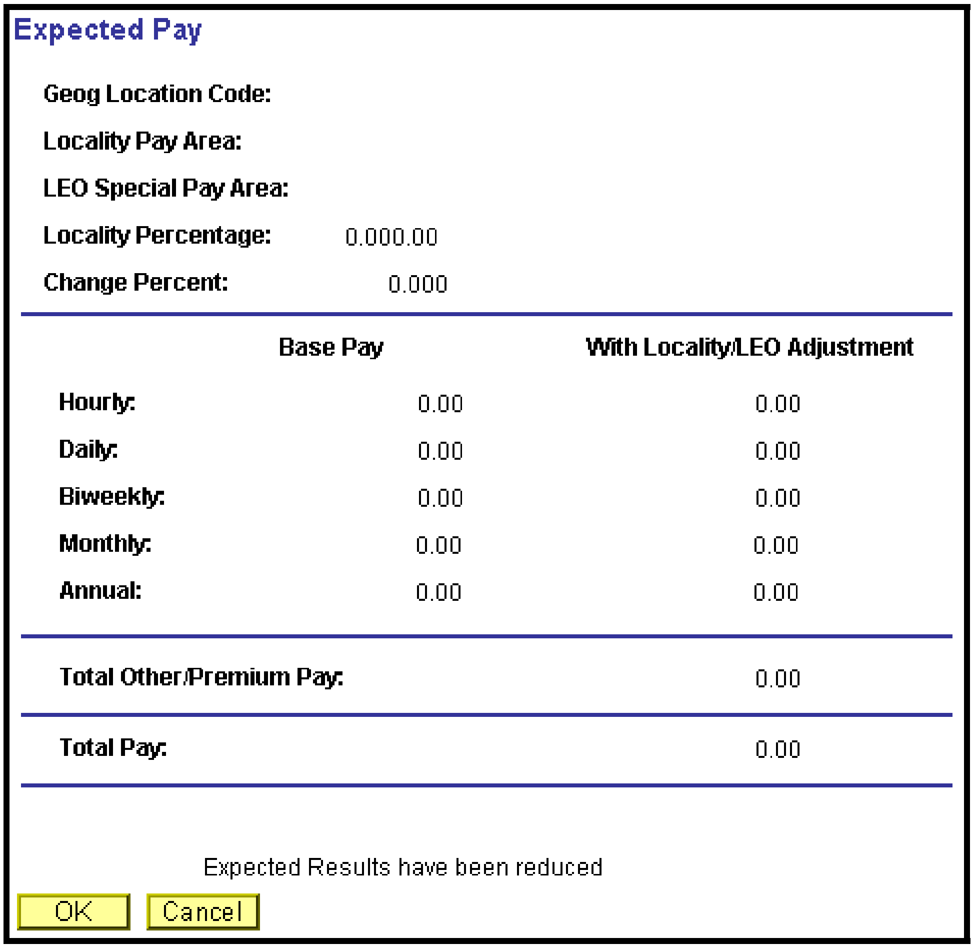
Pay Impacts

The annuity offset amount must be entered correctly in order to avoid significant payroll issues.

Procedure (cont'd)

80 Click on the **Expected Pay** hyperlink to display payroll information.

The following sub-page appears:



81 Verify the read-only information.

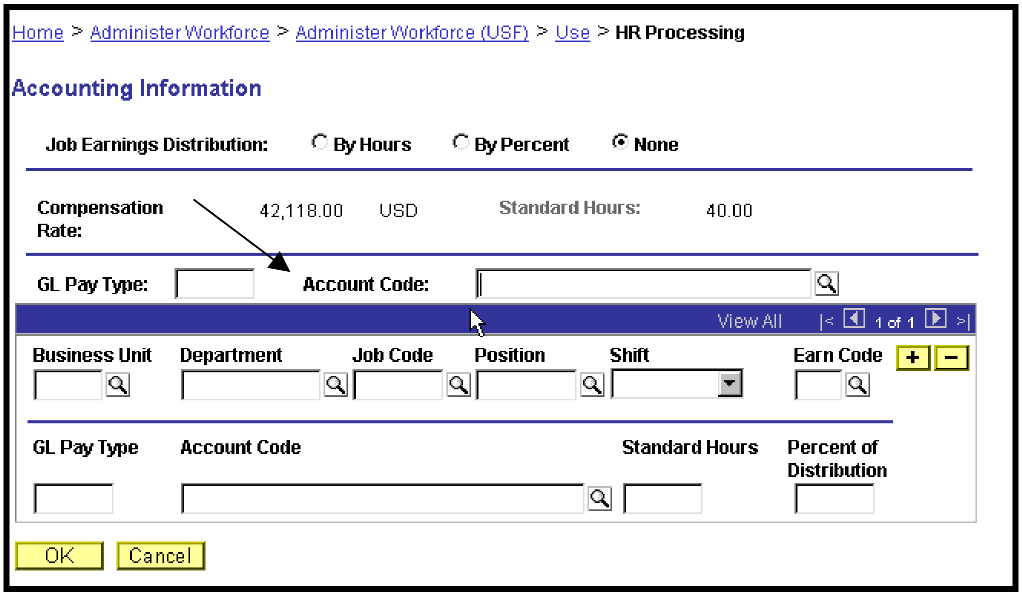
NOTE: DO NOT use the data on this page for pay verifications.

82 Click 

to return to the **Compensation** page.

83 Click on the **Accounting Information** hyperlink.

The following sub-page appears:



84 Enter the CAN in the **Account Code** field noted by the arrow.

Common Account Number

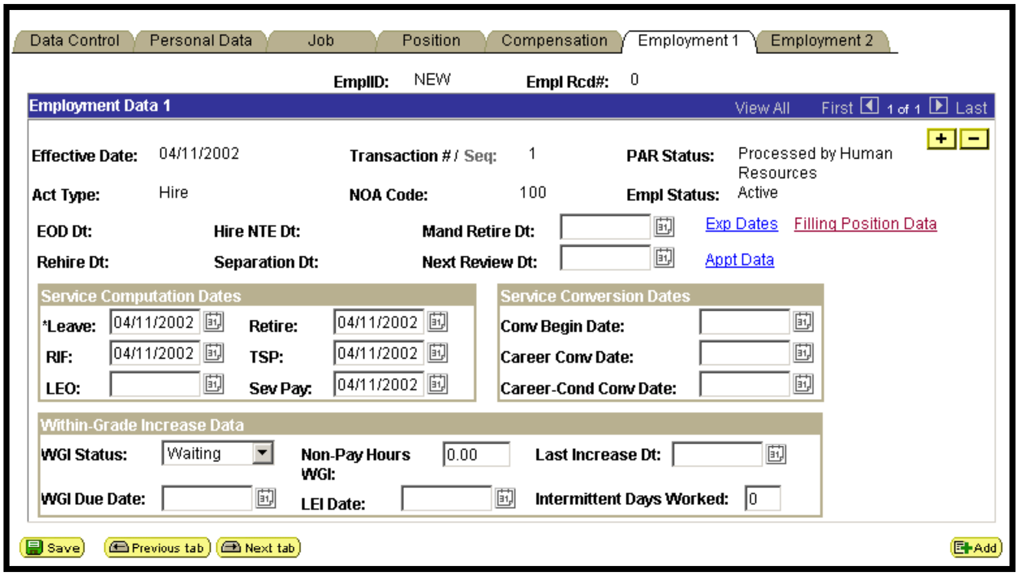
The Common Account Number (CAN) is a required field and must be entered to process the appointment. Once the Hire has been HR Processed, if the CAN was keyed incorrectly, it is the Personnelist's responsibility to process a 002 correction and correct the CAN. A manual modification is sent to payroll to update the old and new Can fields. If a CAN was incorrectly issued for hire or conversion, then notify your Financial Management Office. Your Agency's Financial Management personnel would need to correct the CAN to ensure that the funds are allocated appropriately. Follow current policy. If a CAN is new and does not yet exist in EHRP, notify the Financial Management Office.

Procedure (cont'd)

85 Click OK to return to the **Compensation** page.

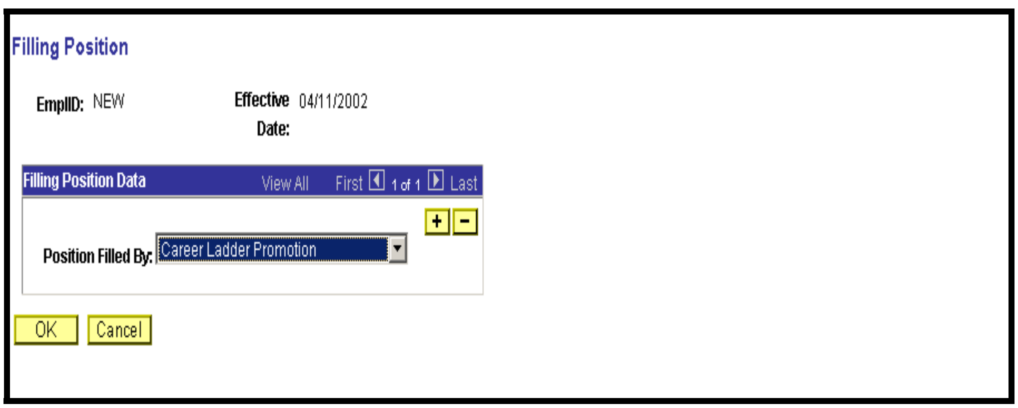
86 Click on the **Employment 1** tab.

The following page appears:



87 Click the **Filling Position Data** hyperlink.

The following sub page appears:

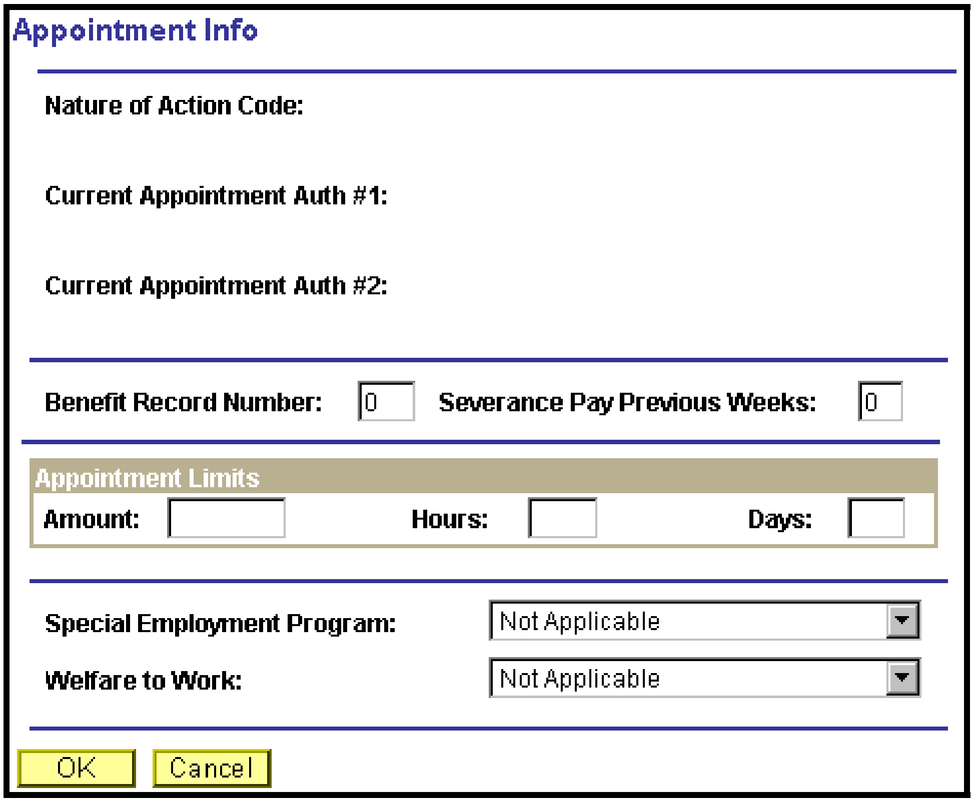


88 From the dropdown menu, select the correct method by which the position has been filled.

89 Click OK to return to the **Employment 1** page.

90 Click the **Appt Data** hyperlink.

The following sub-page appears:



91 From the dropdown menu, select the **Special Employment Program**, if applicable.

NOTE: This is where the Special Program ID would be entered.

*NOTE: **Welfare to Work** should <u>not</u> be captured here.*

92 Click OK to return to the **Employment 1** page.

93 In the **Service Computation Dates** section, modify the **Leave** date, if applicable.

94 Modify the **RIF (Reduction in Force)** date, if applicable.

95 Enter the **LEO (Law Enforcement Officer)** date, if applicable.

96 Modify the **Retire** date, if applicable.

97 Modify the **TSP (Thrift Savings Plan)** date, if applicable.

98 Modify the **Sev (Severance) Pay** date, if applicable.

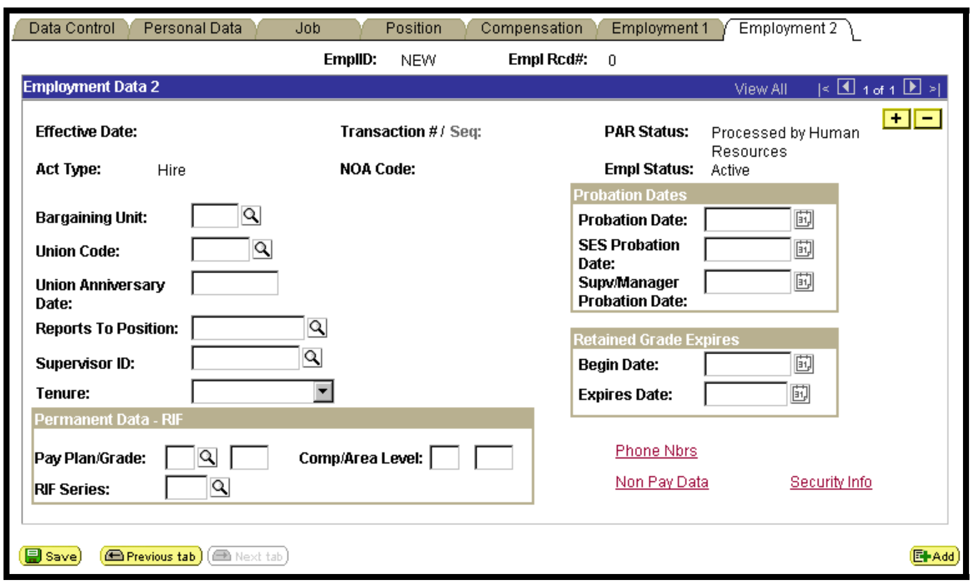
*NOTE: The **Career Conv (Conversion) Date** will default to 3 years from the effective date when the conditional tenure is selected on the Employment 2 page.*

*NOTE: The **WGI Status** will default to "Waiting."*

*NOTE: The **WGI Due Date** will populate automatically. THIS IS WGI DUE DATE, **NOT** WGI START DATE.*

99 Click on the **Employment 2** tab.

The following page appears:



NOTE: The following fields default based on the position selected:

- ***Bargaining Unit***
- ***Reports To Position***

100 Enter the employee's **Union Code,** if applicable.

101 Confirm or enter the appropriate **Reports To Position** for the employee.

NOTE: The Reports To Position field is required for automatic actions.

102 In the **Tenure** field, select the appropriate type of tenure.

103 As applicable, enter the employee's compensation area and level in the **Comp Level** field.

NOTE: In EHRP, the Comp Level is a 3 digit code. Therefore, when a user enters a 3 character Comp Level Code, the Payroll Interface will automatically add a "0" to the beginning of the Comp Level Code when transmitting that data to Payroll

NOTE: Users should no longer enter any data related to the Comp Area Field. The entire Compl Level code should be entered into the Comp Level field only.

104 In the **Probation Date**, enter the completion date for the employee's probation.

NOTE: If this employee is a SES or Supervisor/Manager enter the probation completion date in the appropriate field.

105 As applicable, enter the employee security information in the **Security Info** hyperlink.

106 Return to the **Data Control** tab and change the **PAR Status** according to your role.

107 Click 

.

NOTE: Document the employee identification number (EMPLID) to facilitate processing benefits and pay documents.

Address Information

After the Hire action is completed, you must ensure that the address information is transmitted to Payroll. In order to do this, process a Data Change action to capture the address information you entered during the Hire process.

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108 Follow the navigational path:

Home ➔ Administer Workforce ➔ Administer Workforce (USF) ➔ Use ➔ HR Processing

109 Access the employee record for the person you just hired.
NOTE: If you do this immediately after saving the Hire action, the same employee record will be available.

110 Click on the + to add a row.

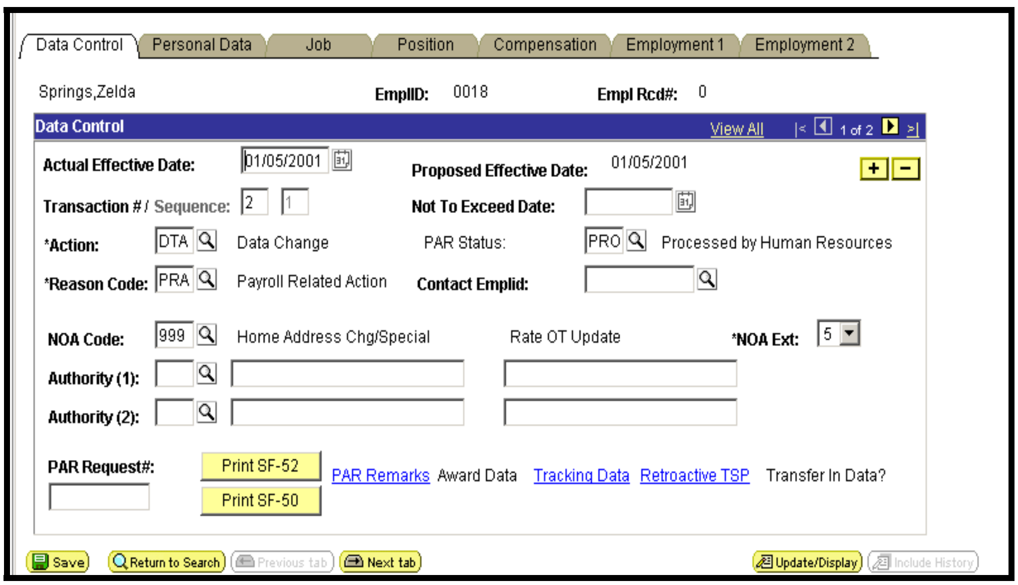
111 Use the same effective date as the Hire action.

112 Select the Action "**DTA**" (Data Change).

113 Select the Reason Code **"PRA"** (Payroll Related Action).

114 Select the NOA Code **999**, extension **5.**

115 **Click** Save.



Leave Plan Enrollment

All employees need to be enrolled in leave plans (annual and sick), which must be entered in the Administer Base Benefits module of the system. Follow the procedure below for detailed instructions on how to enroll the employee in the applicable leave plans. Other benefits will be covered in subsequent chapters.

Procedure

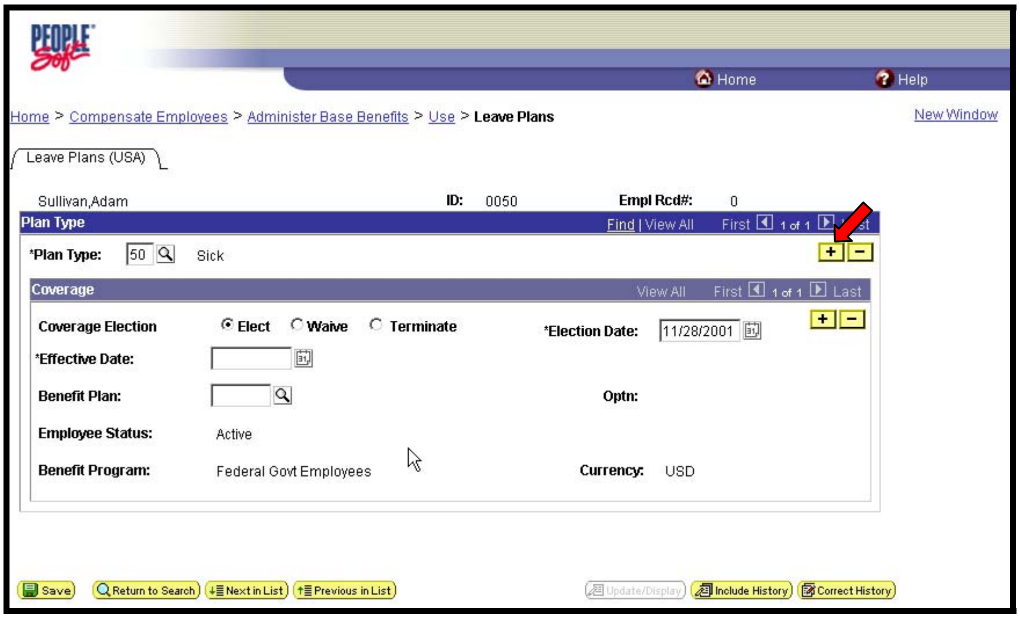
The following steps detail the procedure for enrolling an employee into leave plans in EHRP:

116 Follow the navigational path:

Home ➔ Compensate Employees ➔ Administer Base Benefits ➔ Use ➔ Leave Plans

117 Select the appropriate employee's record.

The following **Leave Plans** page appears:



118 In the **Plan Type** field, select the applicable leave plan.

119 In the **Coverage Election** field, be sure the **Elect** radio button is selected to establish the new Leave benefit.

120 The **Election Date** field will default to today's date.

121 In the **Effective Date** field, enter the date on which the employee is eligible for the new leave benefit.

NOTE: This date should be identical to the date of the hire.

122 In the **Benefit Plan** field, enter the appropriate leave plan based on the employee's eligibility.
NOTE: Since both sick and annual leave plans require enrollment, the process must be repeated.

123 In the **Plan Type** box, use the [+], as indicated by the arrow above, to insert a new row.

*NOTE: To modify **Coverage** information, click the [+] in the **Coverage** box.*

124 Select the appropriate leave plan in the **Plan Type** field.

125 Follow the same steps to enter the coverage election, effective date, and benefit plan as shown above.

126 Click [Save].

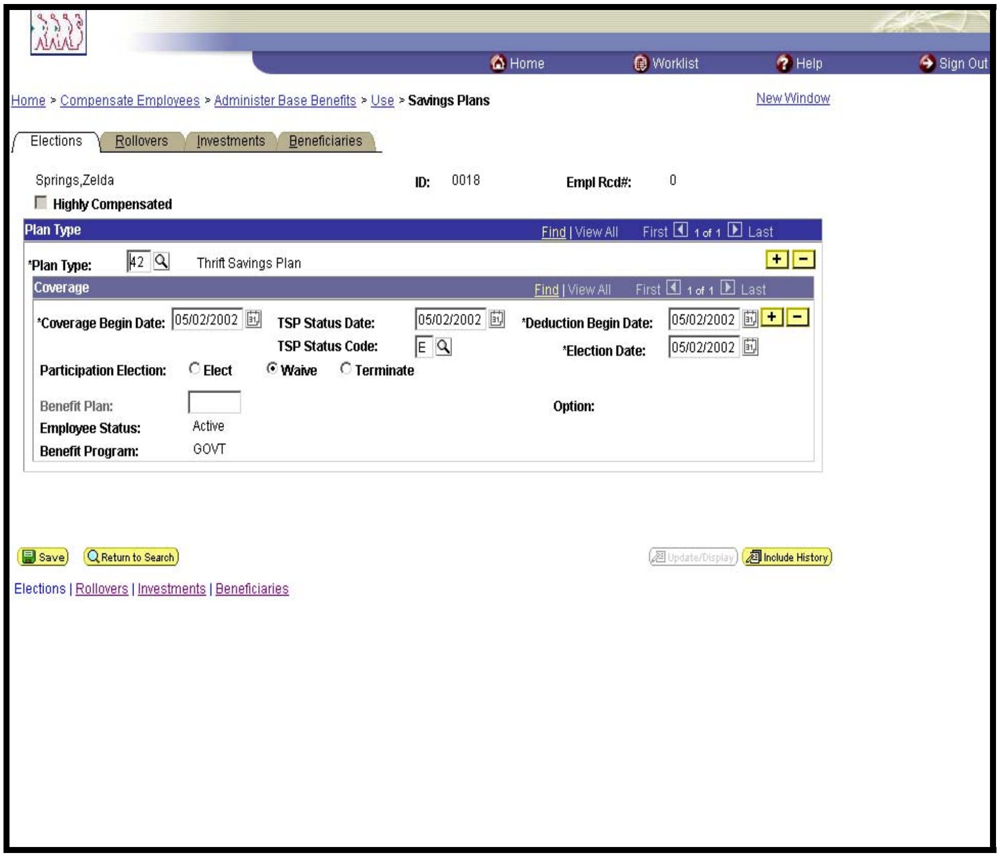
TSP Setup In order to later capture the employee's Thrift savings Plan election, you must set them up under the Savings Plan:

127 Follow the navigational path:

Home ➔ Compensate Employees ➔ Administer Base Benefits ➔ Use ➔ Savings Plan

128 Select the appropriate employee's record.

The following **Savings Plan** page appears:



129 The **Plan Type “42”** (TSP) will default.

130 Enter the **Coverage Begin Date** (same as Effective date of the Hire); this date will also populate the **Deduction Begin Date** and **Election Date** fields.

131 Enter the **TSP Status Date**. (same as Effective date of Hire)

132 Select the correct value from the dropdown menu for the **TSP Status Code** field.

133 In the **Participant Election** field, select the “**Waive**” radio button.

134 Click 
.